

DESTINATION ANALYSTS'  
CORONAVIRUS  
TRAVEL SENTIMENT  
INDEX REPORT

KEY FINDINGS—WEEK OF APRIL 19<sup>TH</sup>, 2021

# About Destination Analysts

Destination Analysts is a market research company that offers businesses a **breadth of insights**, from the comprehensive understanding of target audiences and customer profile development, to ROI analysis and economic forecasts.

Clients seek us out for unique and more deeply thoughtful analysis, our **actionable storytelling** of data, high quality and defensible findings, and progressive and open approach to research methodologies.

In addition to this report, Destination Analysts conducts ***The State of the American Traveler*** and ***The State of the International Traveler***—the travel industry’s premier studies for tracking traveler sentiment and global destination brand performance—as well as ***The CVB and the Future of the Meetings Industry*** annual study helping destination marketing organizations transform their meetings sales and services strategies.



## IMPORTANT

The data and findings presented here are from our **independent research**, which is unique in that it is not sponsored, conducted nor influenced by any advertising or marketing agency. This means that you can trust that it is not serving any agenda other than to provide you **reliable information** upon which to base decisions for your organization's or tourism community's future.

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**Join us and your other travel industry peers during our Tuesday webinar to explore our study's latest findings in detail.**

**This week's travel insights update will be followed by a panel discussion with hotel executives from across the country. Tune in as hoteliers share their outlook for this summer season and the operational changes that are here to stay.**

**Sign up to attend the webinar on Tuesday, April 20<sup>th</sup> at 11:00am ET [here](#).**

# Key Findings for the Week of April 19<sup>th</sup>

Please cite **Destination Analysts** when using or distributing this data

# Americans' Readiness to Travel Reaches a Pandemic Era High

Although coronavirus cases are rising in nearly half of the U.S., Americans' COVID anxiety grew only mildly.

Even in the Midwest, which is particularly affected by the latest growth in cases, levels of COVID concern remained relatively stable; in fact, it is those in the Northeast who continue to exhibit the highest levels of COVID concerns. Also, despite the pause in J&J vaccine administration, two-thirds of American travelers still say they have or plan to get a COVID-19 vaccine. Of those who report receiving a vaccine, over 70% say they are now fully vaccinated. This combined with optimism about the future (47.6% feel that the pandemic situation will improve in the next month) have contributed to another week of record setting in travel readiness and safety. Americans' confidence in their ability to travel safely reached a pandemic record, as did the perception of travel activities as safe. **Now 72% say they are in a ready-to-travel mindset—up nearly 20 percentage points since the start of the year.**

## AMERICANS' READINESS TO TRAVEL REACHES A PANDEMIC ERA HIGH MAY 29, 2020 – APRIL 18, 2021



**Question:** When it comes to getting back out and traveling again, which best describes your current state of mind? (select one)

(Base: Waves 12-13 and 15-58 data. All respondents, 1,257, 1,214, 1,205, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204, 1,209, 1,204, 1,208, 1,202, 1,206, 1,202 and 1,210 completed surveys.)

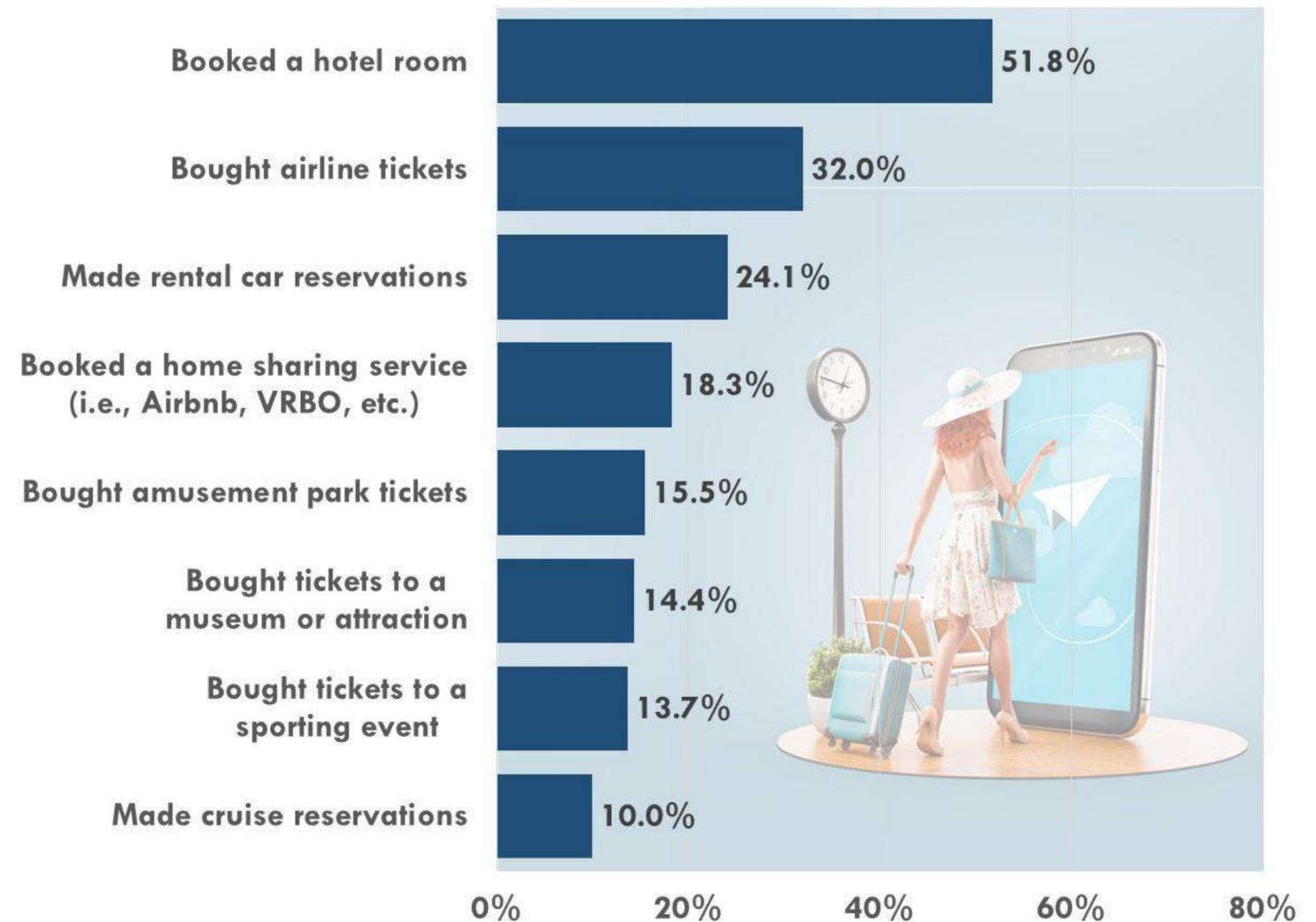
# Travel Reservations Made in the Past Week

The growth in a readiness mindset has led to an increase in the dreaming, planning, booking—and actual doing of—travel.

Three-quarters of American travelers did some travel planning and dreaming in the past week alone, with 16.4% actually making a reservation or booking. **Of these bookers, over half made a hotel reservation, nearly a fifth reserved a vacation home/AirBnB and a third bought airline tickets.**

Over 75% of American travelers will take at least one trip in the next 3 months, and a record 88% have at least tentative travel plans for the future. Americans are also showing that they are open to even more travel beyond what they may currently have planned. Nearly two-thirds have a high excitement level about the prospect of a trip they had not previously considered, and similarly 63.4% are highly open to travel inspiration right now.

## TRAVEL RESERVATIONS MADE IN THE PAST WEEK AS OF APRIL 18, 2021



**Question:** Which of these travel reservations did you make this week? (select all that apply)

(Base: Wave 58 data. Respondents who made travel reservations this week, 216 completed surveys. Data collected April 16-18, 2021)

# Travel Messaging Channels

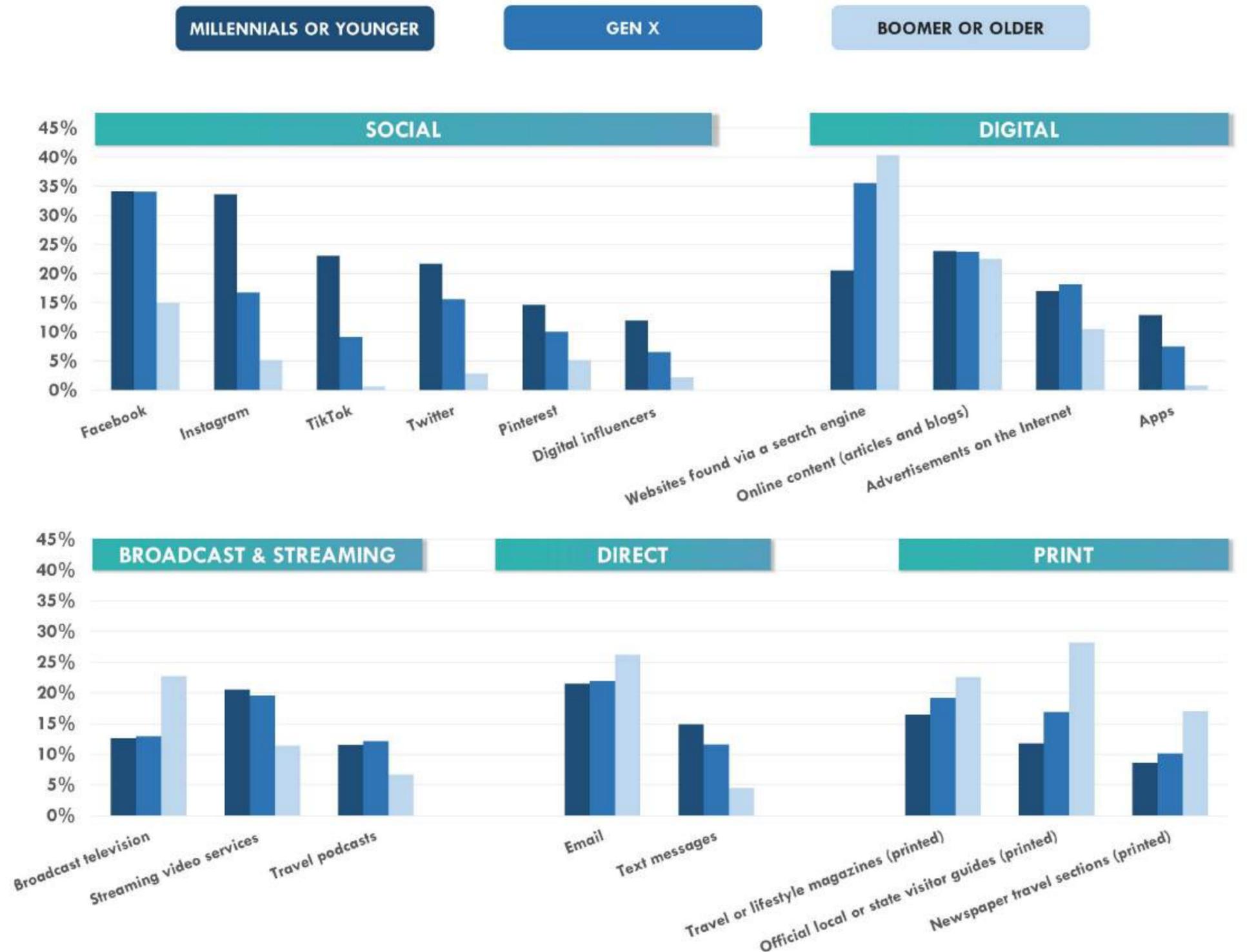
For travel marketers to reach and capitalize on the high rates of excitement and openness to inspiration, fortunately, **American travelers are showing a receptiveness to travel messaging in a variety of channels.**

However, save for email and online articles/blogs, desired channels for travel content and advertising are highly impacted by age. **Social media is most common for younger travelers, who are open to travel messaging on a variety of these platforms, while older travelers remain largely committed to Facebook.** Tik Tok, a rising star throughout the pandemic, is growing as a channel for travel influence, with nearly a quarter of younger travelers saying it is an ideal place to reach them, surpassing Twitter. Television remains a top source to reach travelers, with younger travelers on streaming services and older travelers on broadcast. Search engine marketing also remains key for travel marketing, particularly to reach older travelers. An important proportion of travelers—even the younger ones—are looking to print resources like travel & lifestyle magazines, as well.

**Question:** Please think about how travel destinations could best reach you with their messages right now. Where would you generally be **MOST RECEPTIVE** to learning about new destinations to visit? (Please select all that apply)

(Base: Wave 58 data. All respondents, 1,210 completed surveys. Data collected April 16-18, 2021)

## CHANNELS AMERICANS ARE MOST RECEPTIVE TO TRAVEL MESSAGING IN AS OF APRIL 18, 2021

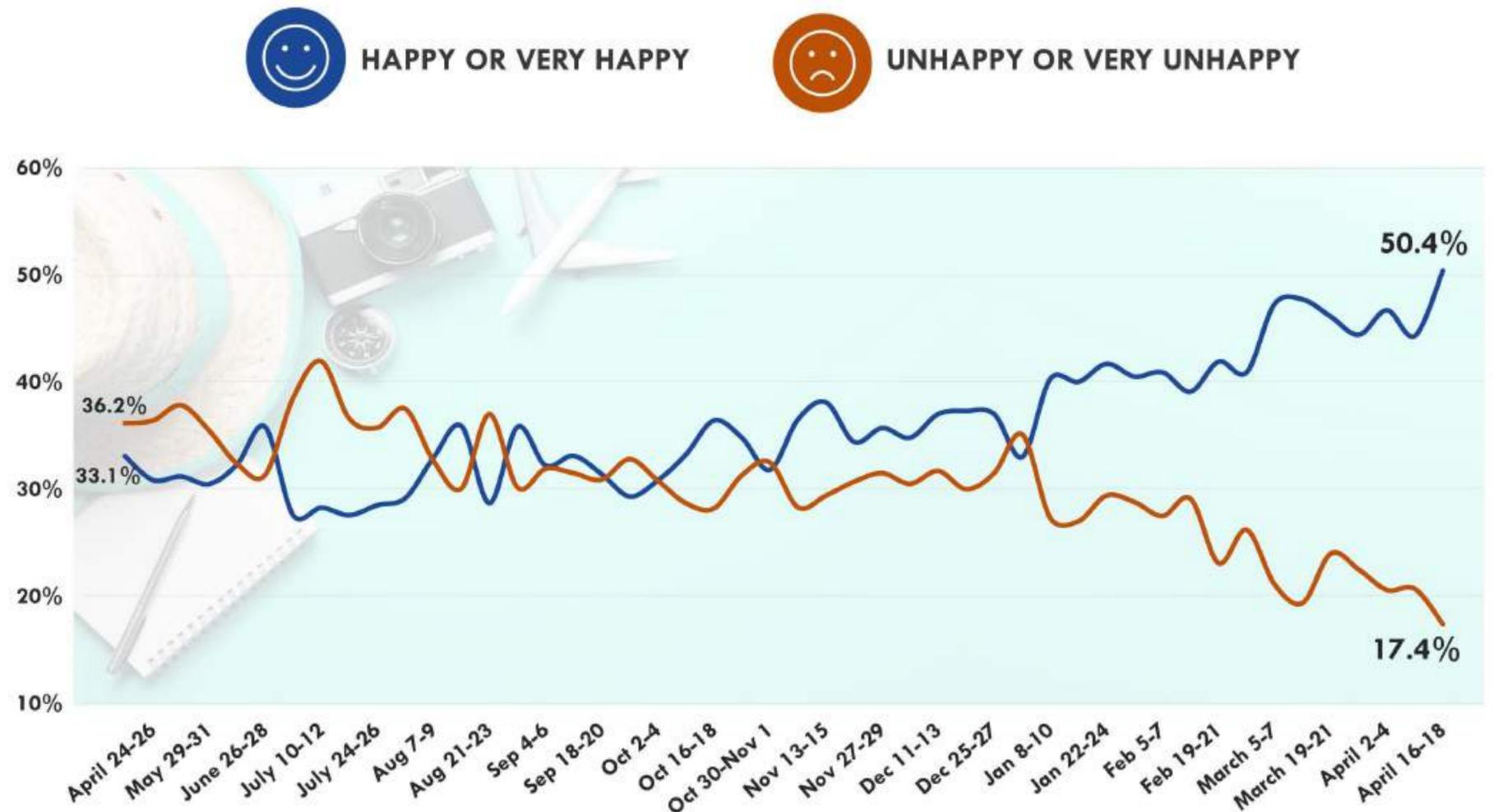


# Tracking Tourism Support

## TRACKING TOURISM SUPPORT: HALF OF AMERICANS WOULD NOW BE HAPPY SEEING AN AD PROMOTING TOURISM TO OWN COMMUNITY APRIL 24, 2020 – APRIL 18, 2021

Americans are even demonstrating increased happiness on seeing their own communities advertised for tourism, reflecting a larger trend in support of travel.

This week, a record 50.4% said they would feel happy if they saw an ad promoting where they live as a place for tourists to come visit. Conversely, a record-low 17.4% said they aren't ready for tourists in their community yet.



**Question:** How would you feel if you saw an advertisement today promoting your community as a place for tourists to come visit when it is safe?

(Base: Waves 7-9, 12-13 and 16-58 data. All respondents, 1,198, 1,199, 1,250, 1,203, 1,231, 1,365, 1,213, 1,200, 1,206, 1,224, 1,201, 1,202, 1,207, 1,250, 1,225, 1,205, 1,200, 1,205, 1,203, 1,203, 1,204, 1,203, 1,203, 1,205, 1,206, 1,205, 1,205, 1,204, 1,206, 1,201, 1,207, 1,206, 1,225, 1,205, 1,206, 1,209, 1,209, 1,216, 1,210, 1,204, 1,209, 1,204, 1,208, 1,202, 1,206, 1,202 and 1,210 completed surveys.)

# The Ongoing Impact of the Pandemic: Road Trips

As we continue to study the ongoing and lingering effects of the coronavirus pandemic on travel attitudes and behaviors, this week we looked at whether and how road trips—the archetype of travel in the COVID era—would sustain its level of popularity.

**Two-thirds of American travelers road tripped during the pandemic, taking 2.5 of these trips on average.**

Over 62% of these pandemic-era road trippers agreed that this travel reminded them of how much fun road trips can be. Thus, well over half also say their pandemic road trip experiences have made travel by car more appealing. Interestingly, this sentiment was even stronger among Millennial and younger travelers, 60.5% of whom said that travel by car is now more appealing.

## THE ONGOING IMPACT OF THE PANDEMIC: ROAD TRIPS AS OF APRIL 18, 2021

**TWO-THIRDS OF AMERICANS TOOK A ROAD TRIP DURING THE PANDEMIC**

**2.5**

**Average # of Road Trips  
Taken by Americans  
During the Pandemic**



**Say Their Pandemic Road Trip  
Experiences Have Made  
Travel by Car More Appealing**

**51%**

**62%**

**Of Pandemic Road-Trippers  
Agree their Experience  
Reminded Them of How  
Much Fun Road Trips Can Be**



*(Base: Wave 58 data. Respondents who have taken at least one road trip since the start of the pandemic, 808 completed surveys. Data collected April 16-18, 2021)*

# Tracking Business Travel Recovery

Finally, there continues to be more good news about still-slow-but-recovering business travel.

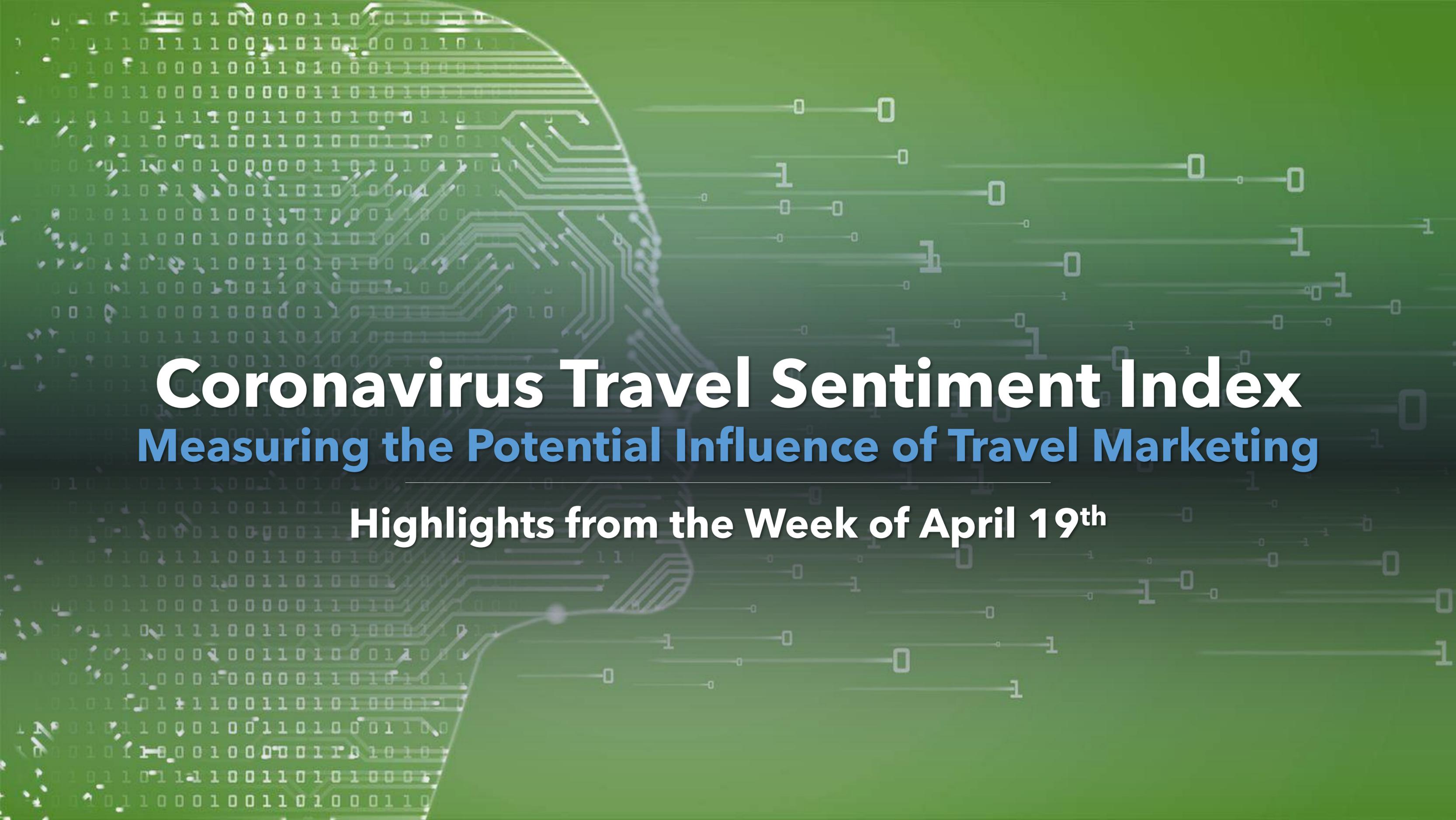
Now **56%** of those employed by companies in which there is business travel say that this travel has resumed, up **8 percentage points from last month**. Perhaps most importantly, the extent of the perceived lasting changes to business travel appears to be retreating. Somewhat fewer business travelers report that the pandemic will change the way their employer does business travel (47% down from 50% in March). The ways business travelers expect changes are also largely down from last month, with less feeling there will be fewer business trips taken and the replacing of trips with virtual meetings.

(Base: Waves 52 & 58 data. Respondents who have taken business trip(s) in the past two years, 193 & 257 completed surveys. Data collected March 5-7 and April 16-18, 2021)

## TRACKING BUSINESS TRAVEL RECOVERY AS OF APRIL 18, 2021



ANTICIPATED BUSINESS TRAVEL CHANGES	
Fewer overall business trips taken—down from 59.8% March 7th	<b>46.8%</b>
Smaller groups traveling on business trips—down from 38.1% March 7th	<b>36.7%</b>
Shorter trips (fewer days in length)—up from 32.4% March 7th	<b>33.8%</b>
More webinars or virtual meetings to replace travel—down from 32.4% March 7th	<b>28.7%</b>
More restrictive travel budgets—down from 29.1% March 7th	<b>26.8%</b>
More restrictive health or safety protocols for traveling staff—down from 16.0% March 7th	<b>15.0%</b>

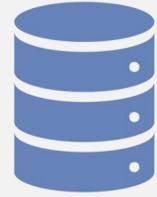


# **Coronavirus Travel Sentiment Index**

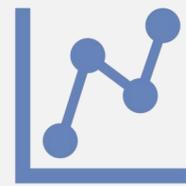
## **Measuring the Potential Influence of Travel Marketing**

**Highlights from the Week of April 19<sup>th</sup>**

# What is a Predictive Index?



Indexing is the practice of compiling data into one single metric.



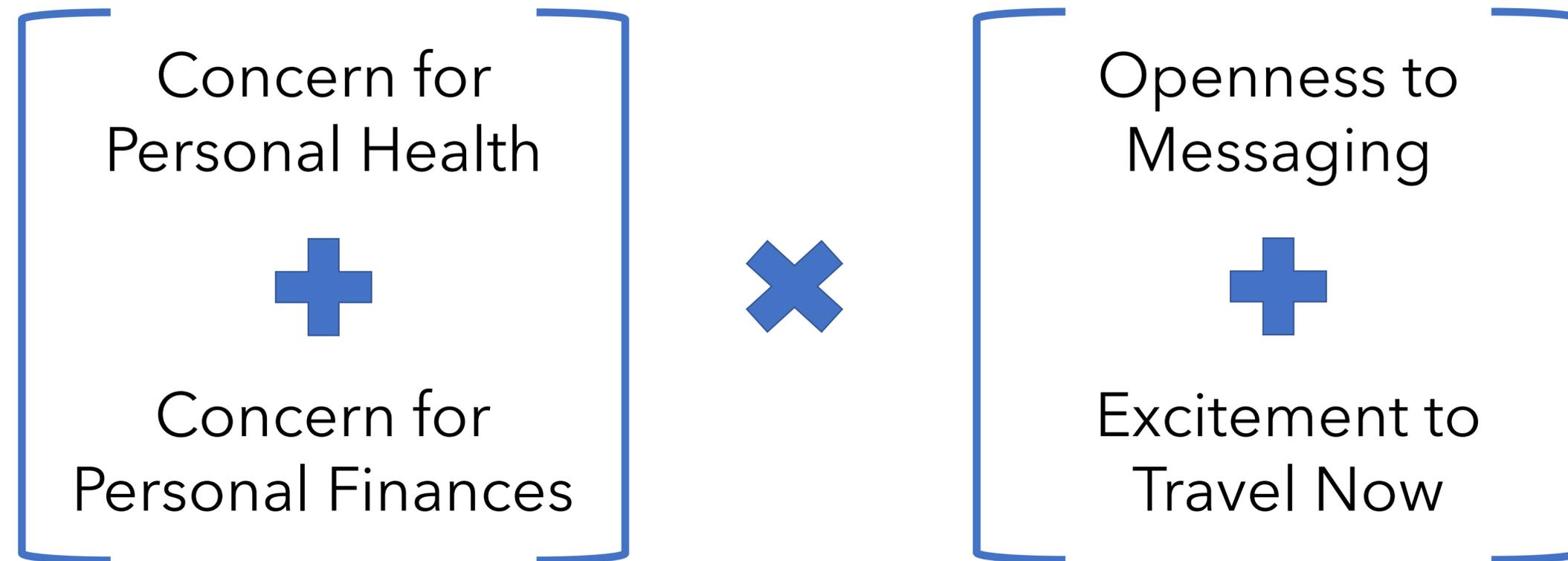
A predictive index is a statistical measure of change in a representative group of data points. The predictive index is then compared to a standard base value in order to make data-driven predictions.



The goals are to identify:

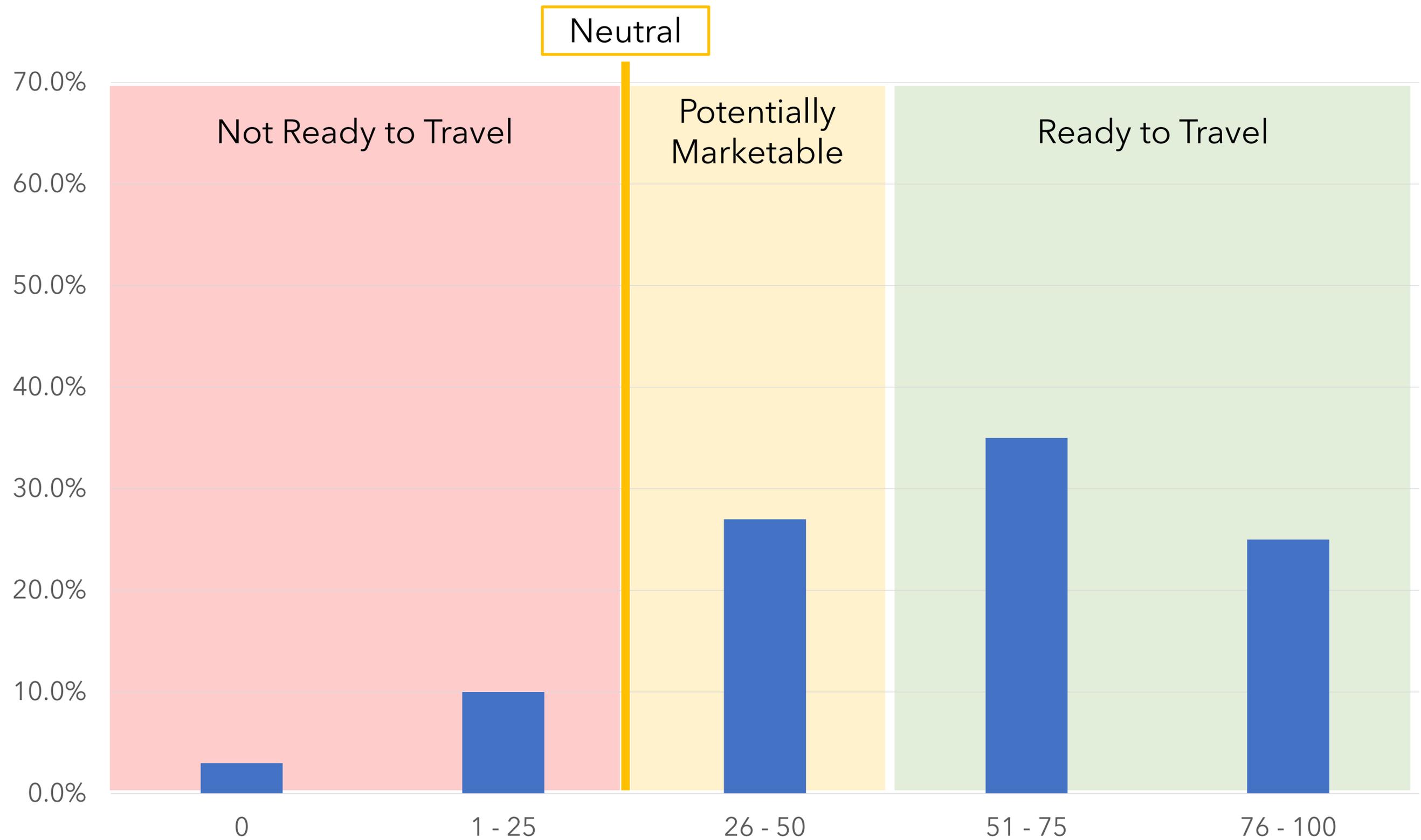
- WHO are the traveler segments that appear receptive to travel marketing and
- WHEN will they be ready to travel

# Predictive Index Formula



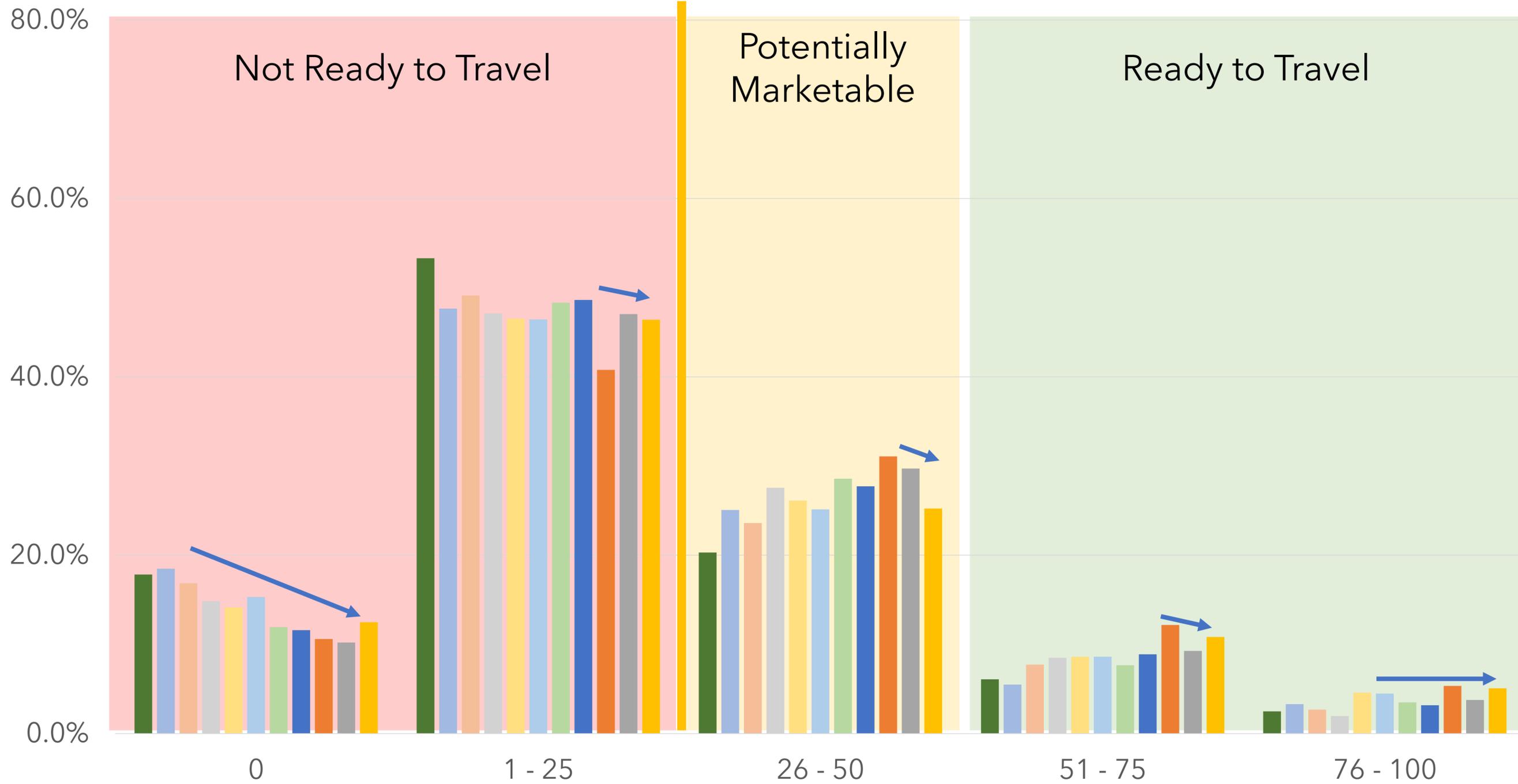
\*Normalized to a 100pt scale

# Healthy Travel Outlook

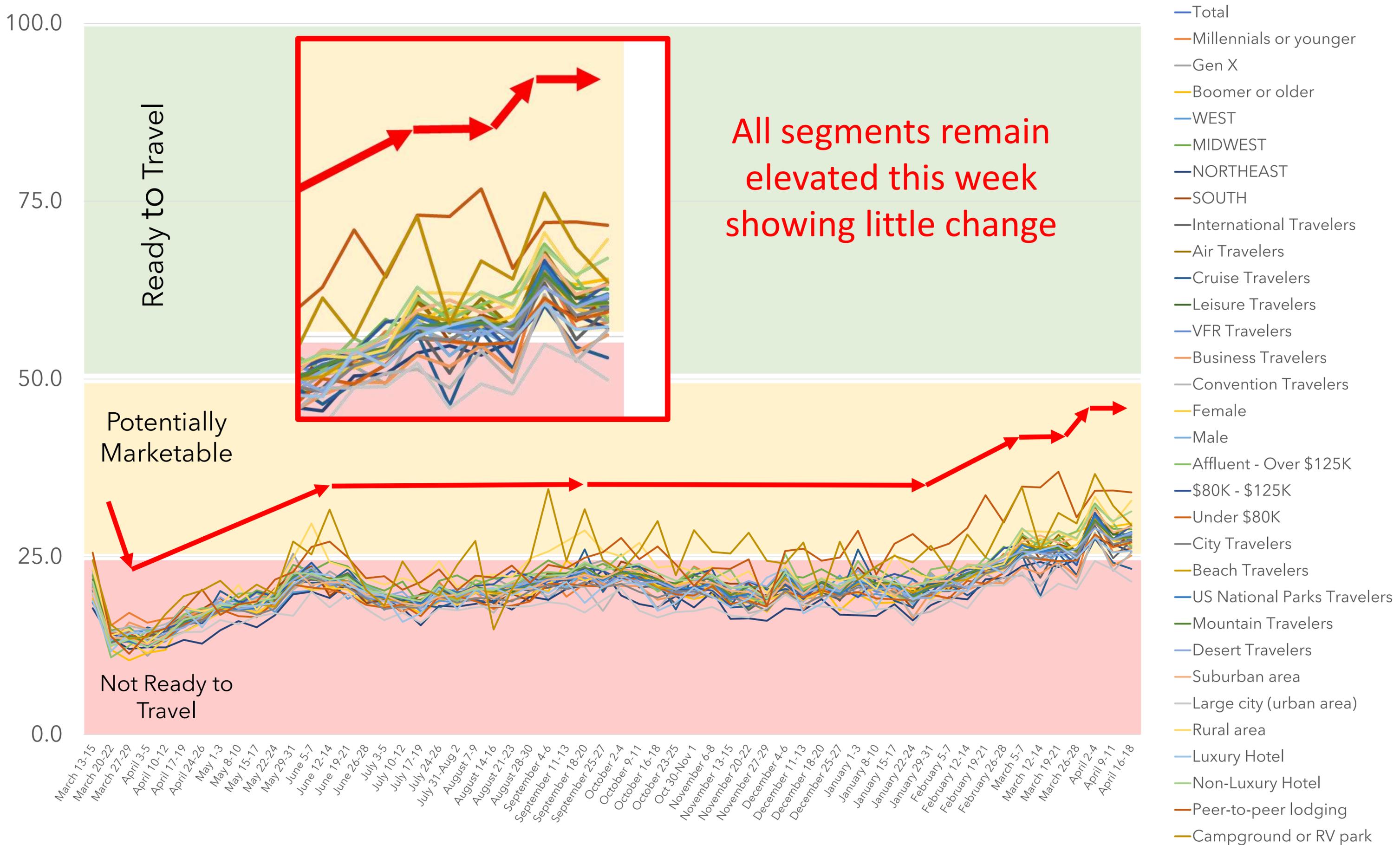


# Travel Outlook

Neutral



- February 5-7
- February 12-14
- February 19-21
- February 26-28
- March 5-7
- March 12-14
- March 19-21
- March 26-28
- April 2-4
- April 9-11
- April 16-18



Ready to Travel

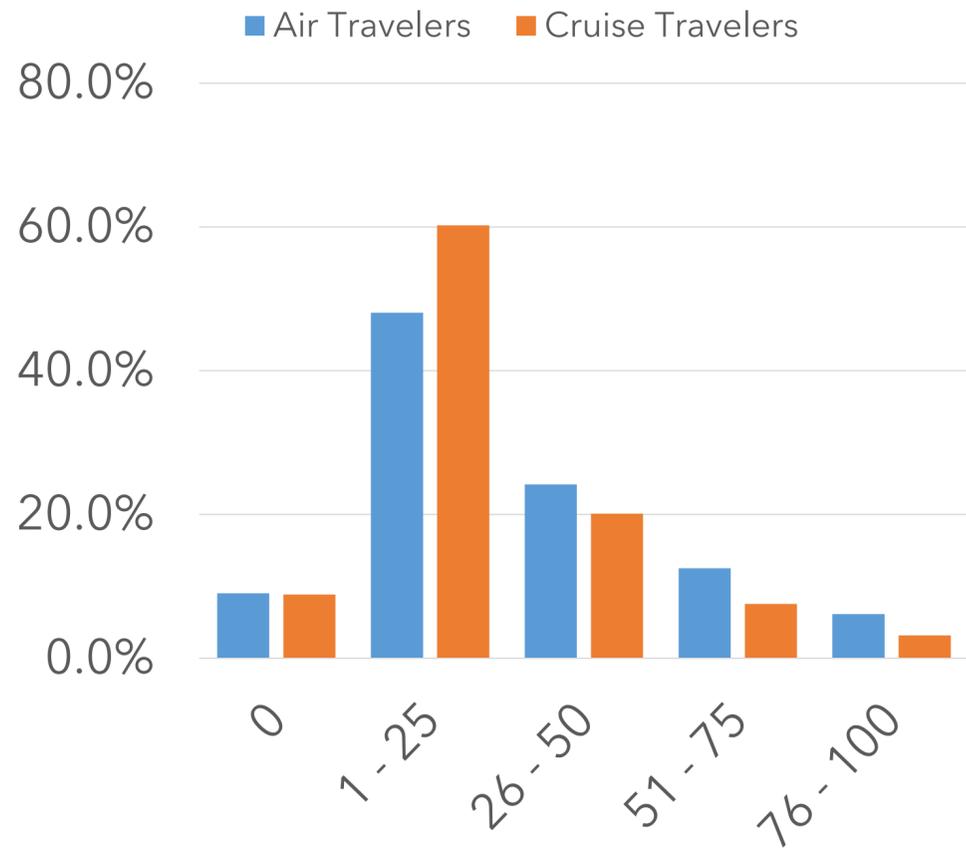
Potentially Marketable

Not Ready to Travel

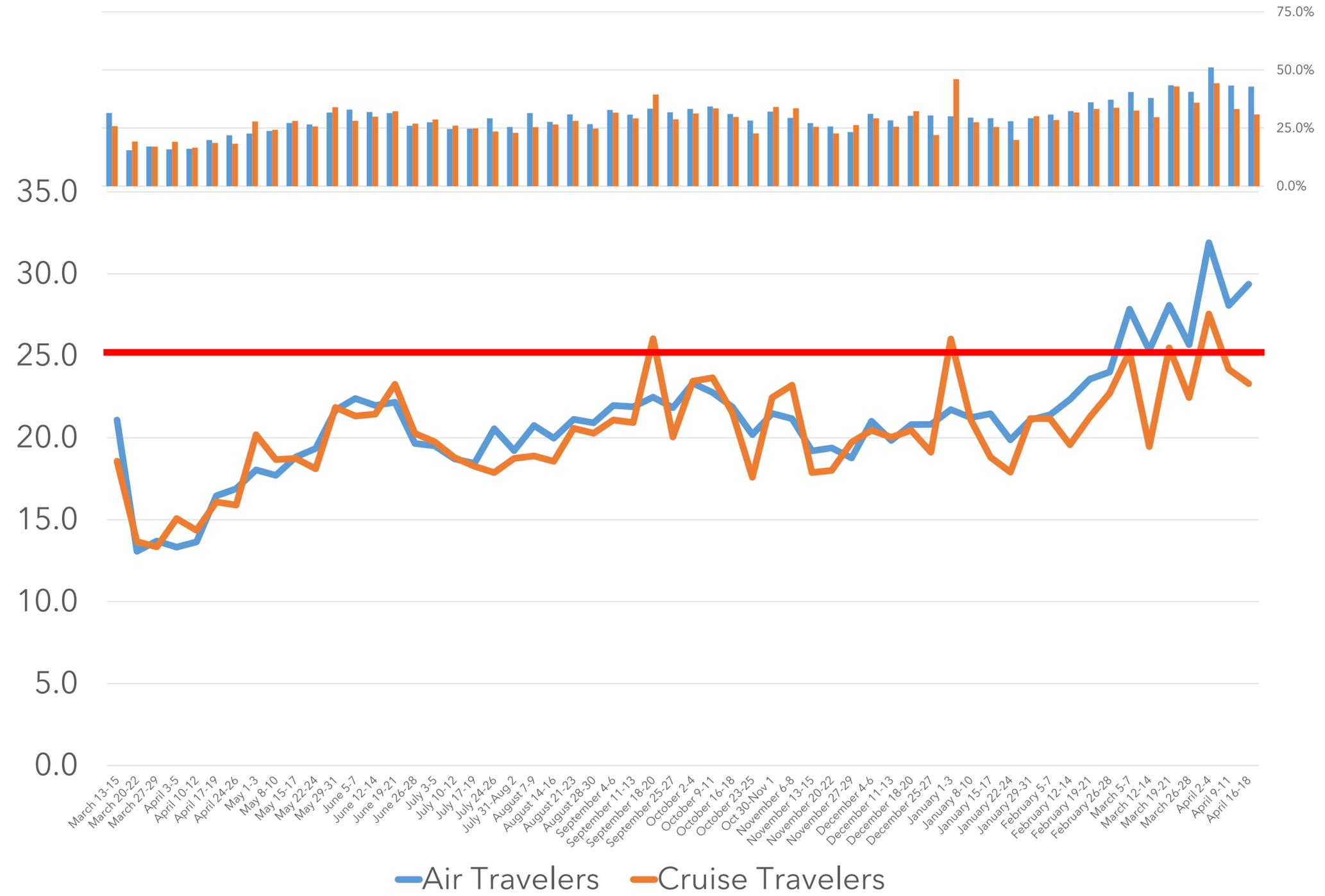
All segments remain elevated this week showing little change

March 13-15  
 March 20-22  
 March 27-29  
 April 3-5  
 April 10-12  
 April 17-19  
 April 24-26  
 May 1-3  
 May 8-10  
 May 15-17  
 May 22-24  
 May 29-31  
 June 5-7  
 June 12-14  
 June 19-21  
 June 26-28  
 July 3-5  
 July 10-12  
 July 17-19  
 July 24-26  
 July 31-Aug 2  
 August 7-9  
 August 14-16  
 August 21-23  
 August 28-30  
 September 4-6  
 September 11-13  
 September 18-20  
 September 25-27  
 October 2-4  
 October 9-11  
 October 16-18  
 October 23-25  
 Oct 30-Nov 1  
 November 6-8  
 November 13-15  
 November 20-22  
 November 27-29  
 December 4-6  
 December 11-13  
 December 18-20  
 December 25-27  
 January 1-3  
 January 8-10  
 January 15-17  
 January 22-24  
 January 29-31  
 February 5-7  
 February 12-14  
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 April 9-11  
 April 16-18

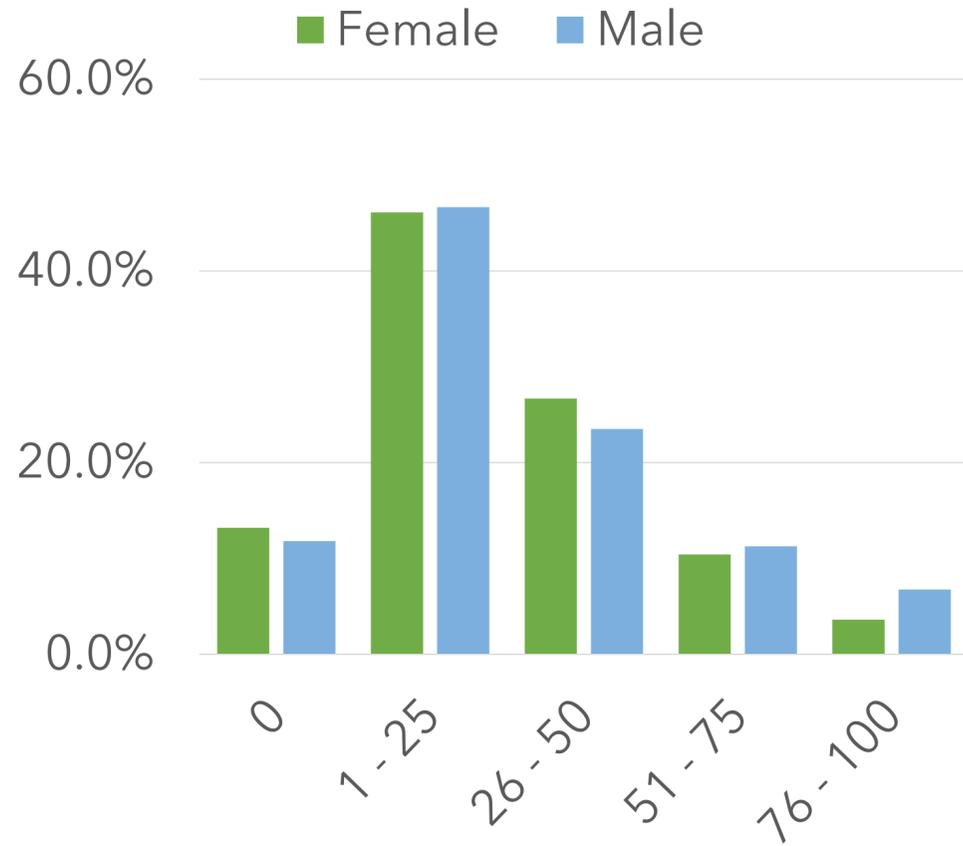
# Airline and Cruise Travelers



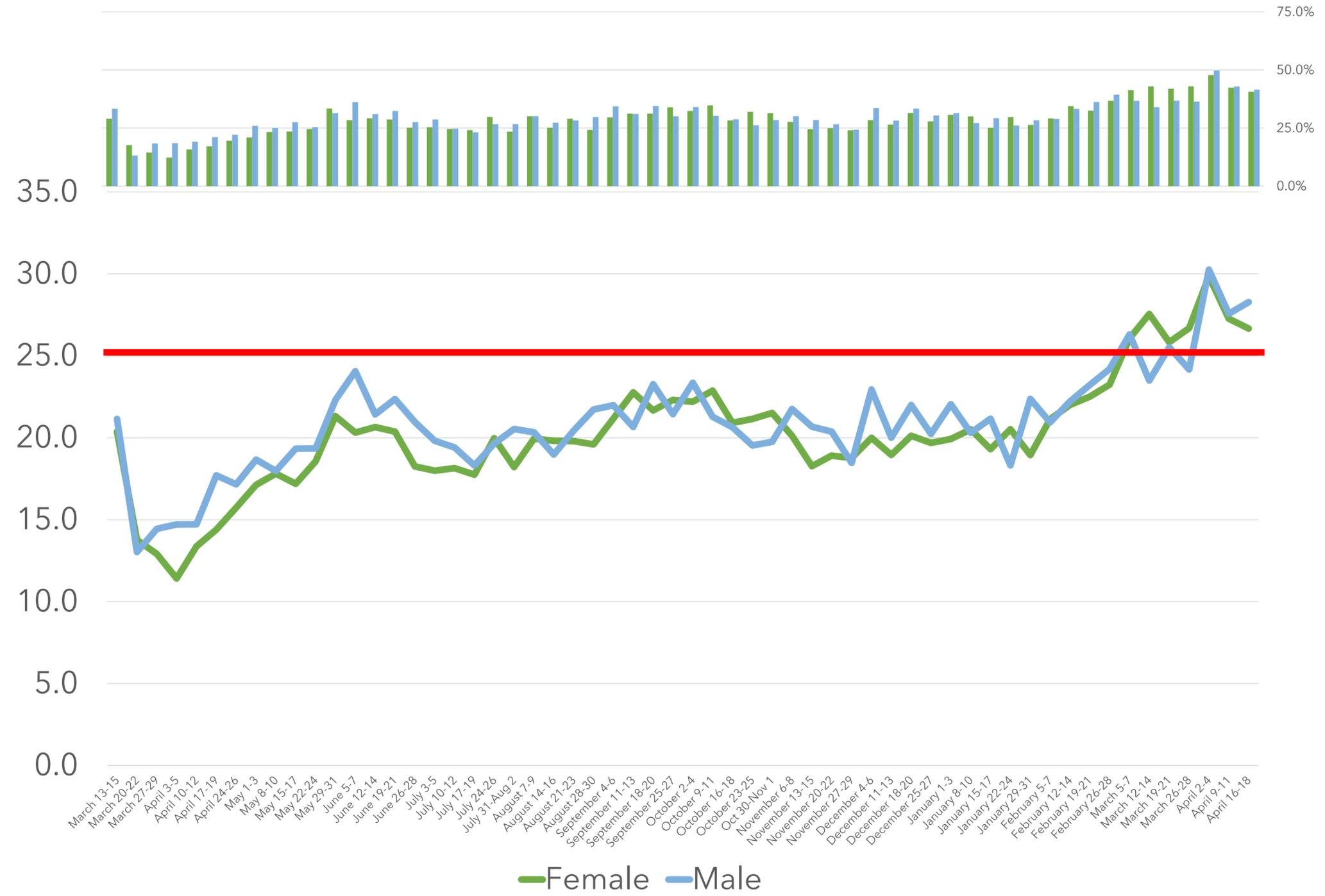
## Percent Potentially Marketable (Index Above 25)



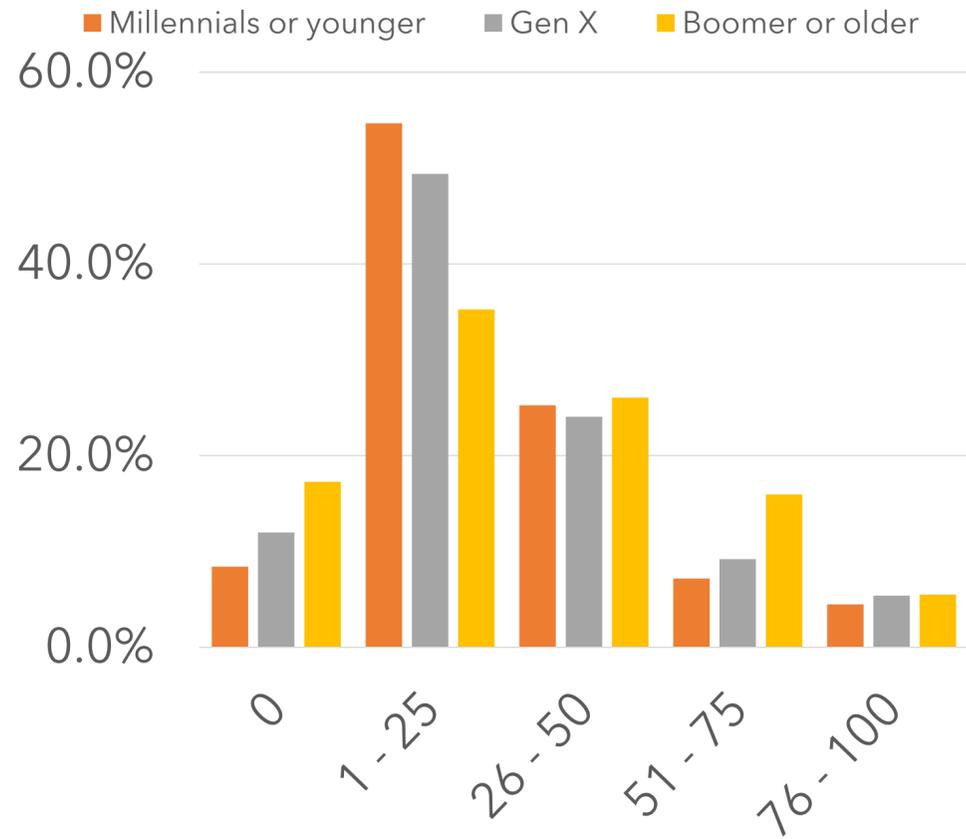
# Gender



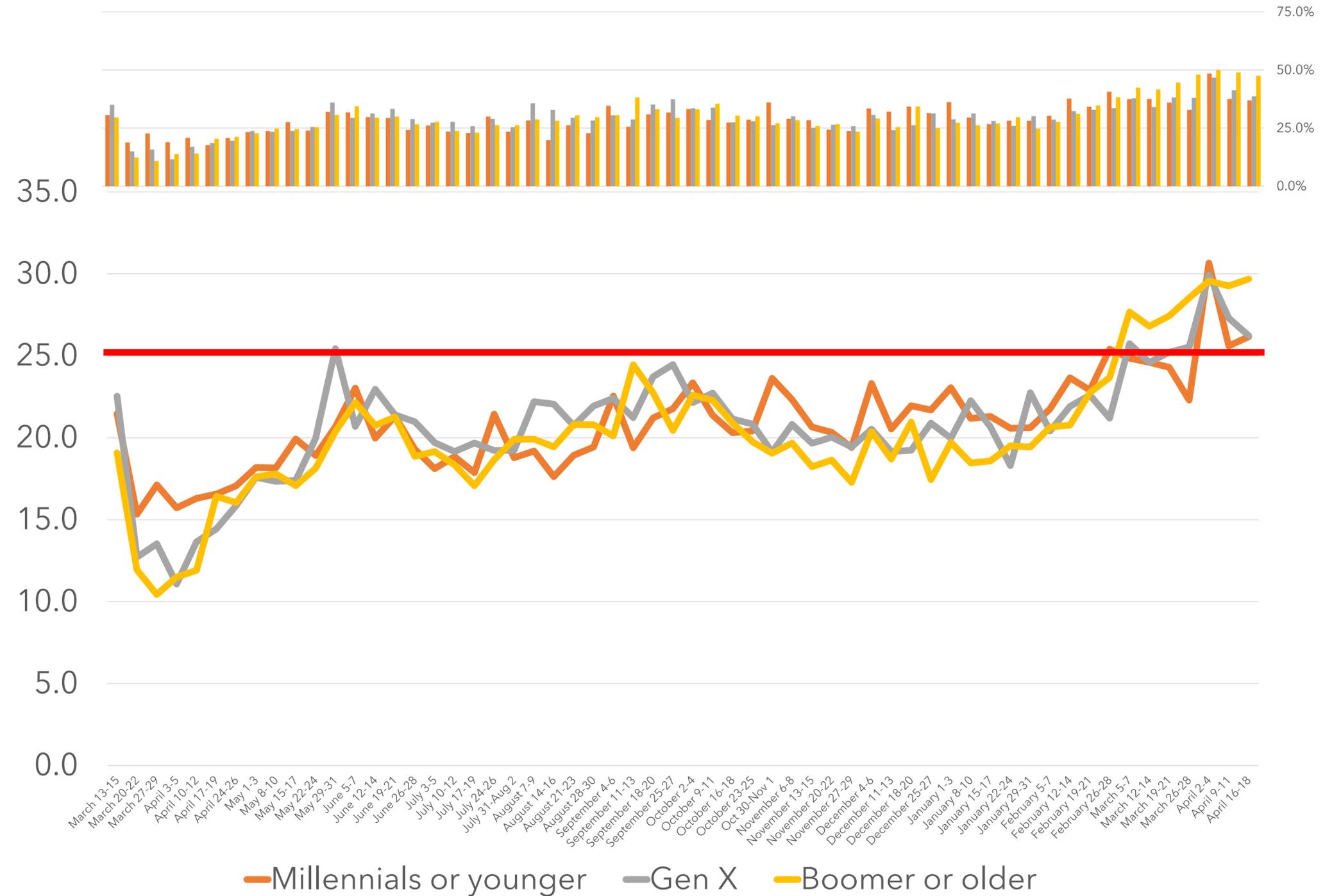
## Percent Potentially Marketable (Index Above 25)



# Generation

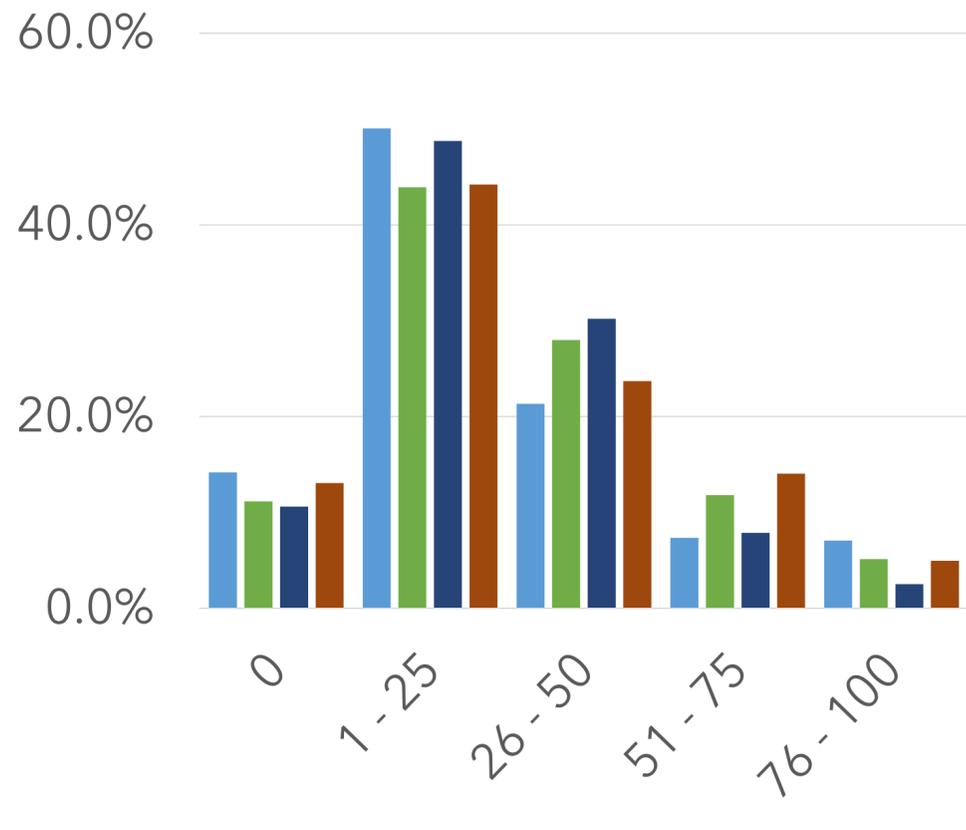


## Percent Potentially Marketable (Index Above 25)

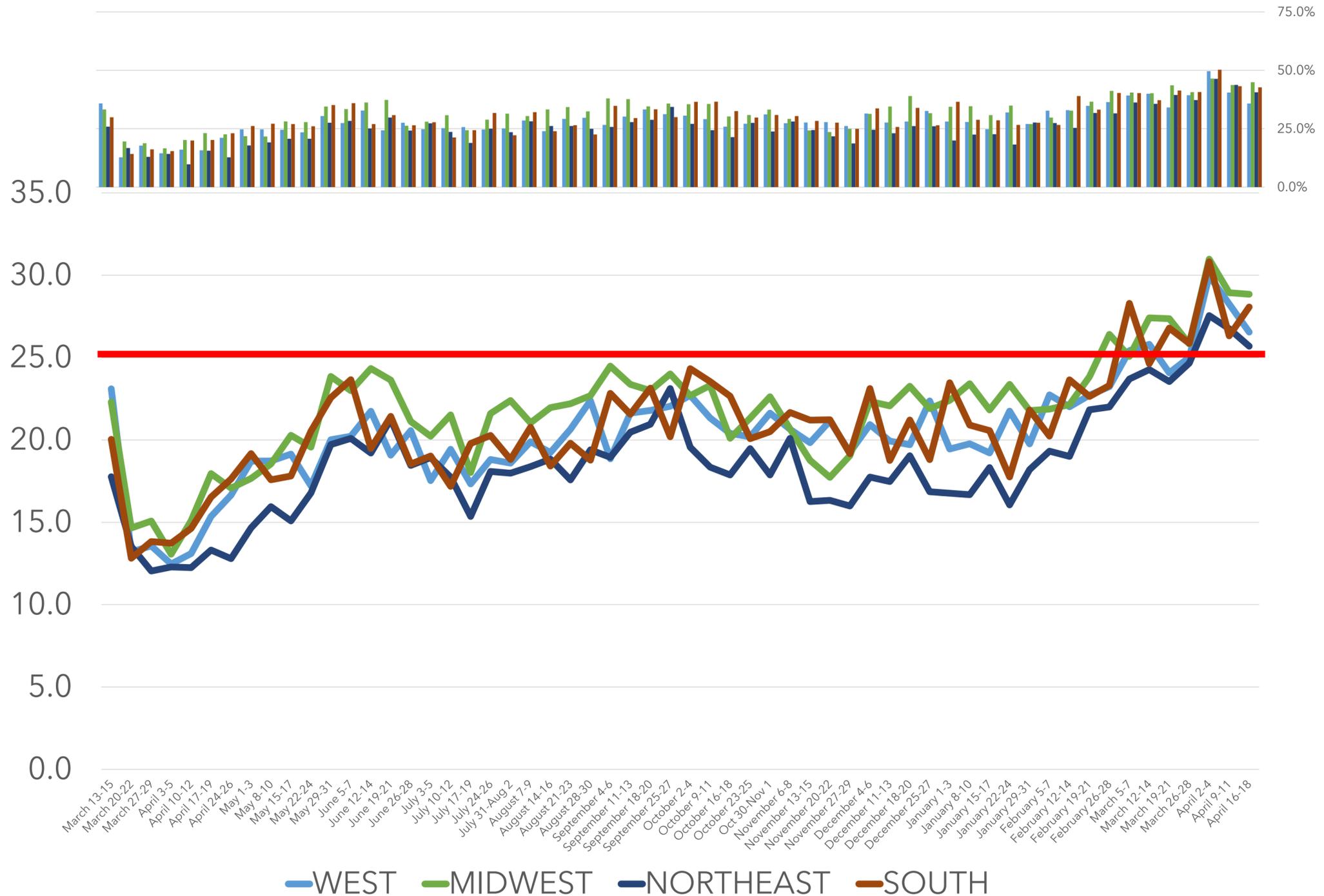


# US Regions

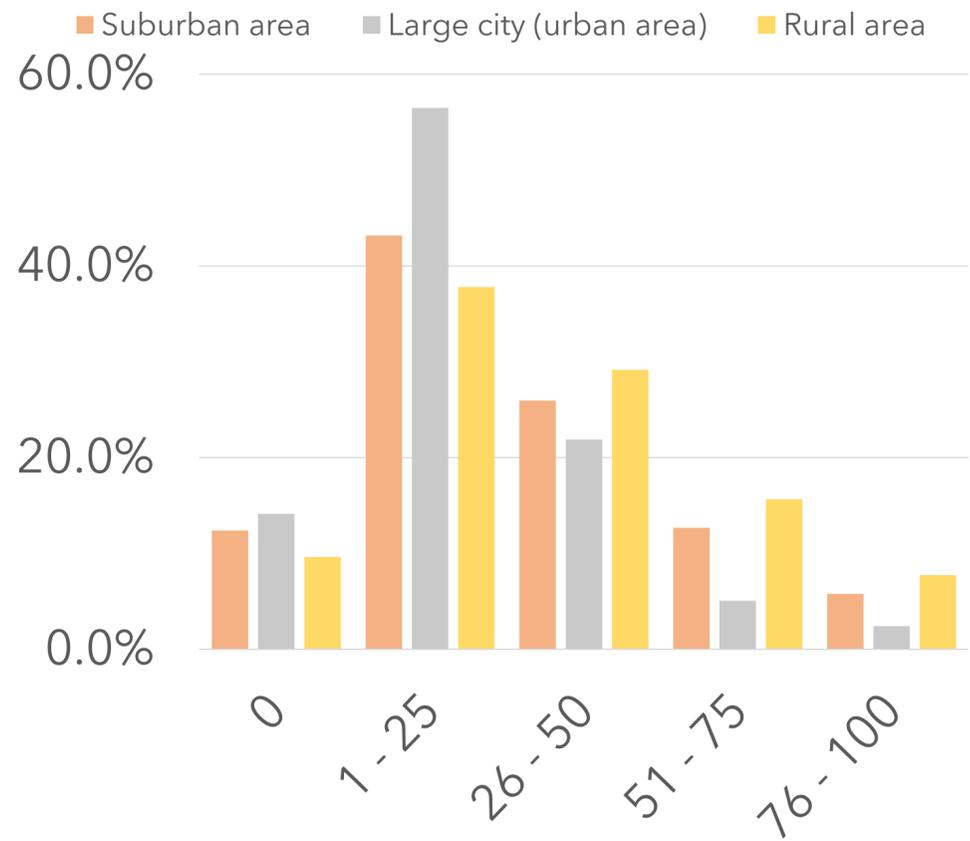
WEST MIDWEST NORTHEAST SOUTH



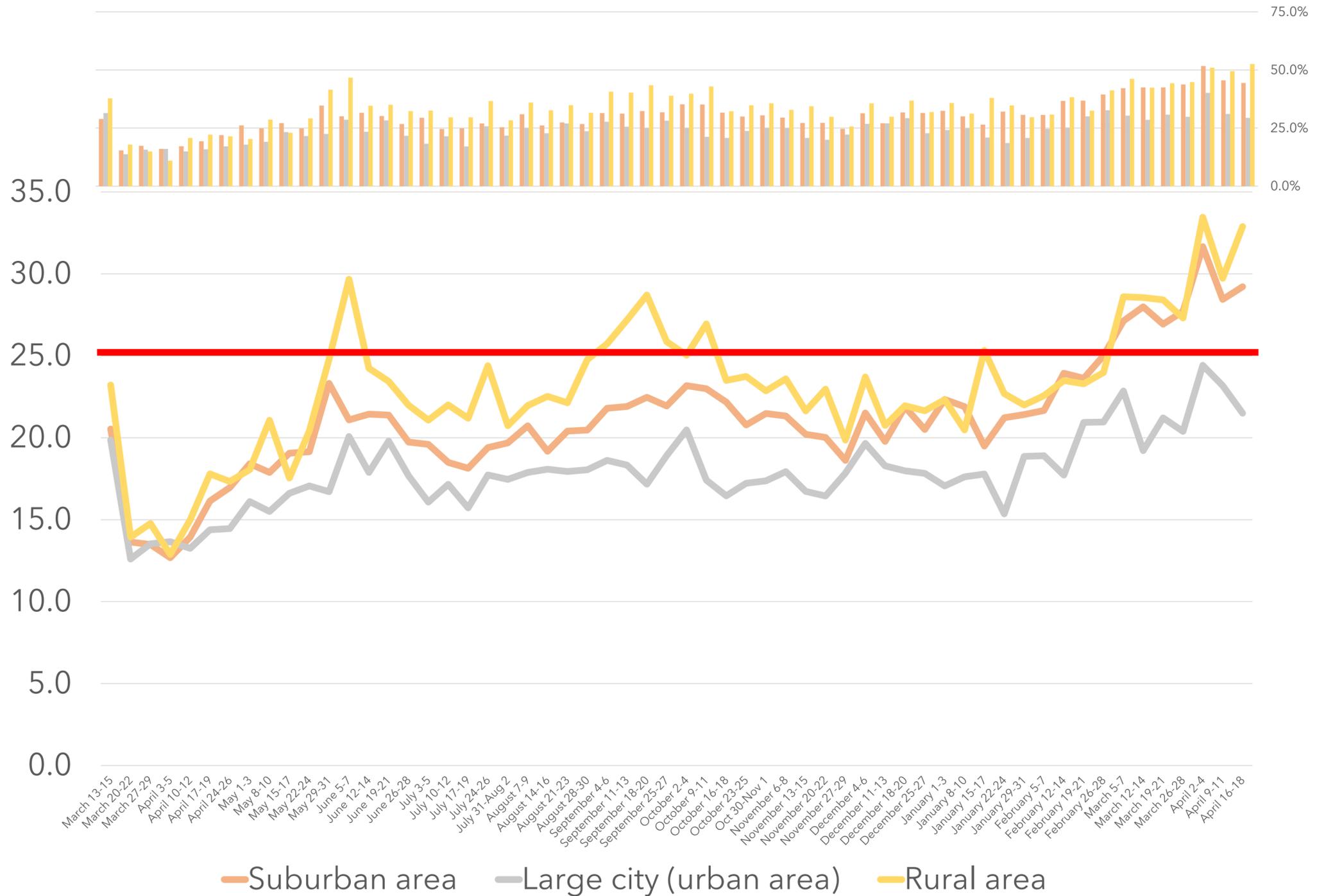
## Percent Potentially Marketable (Index Above 25)



# Residence Type

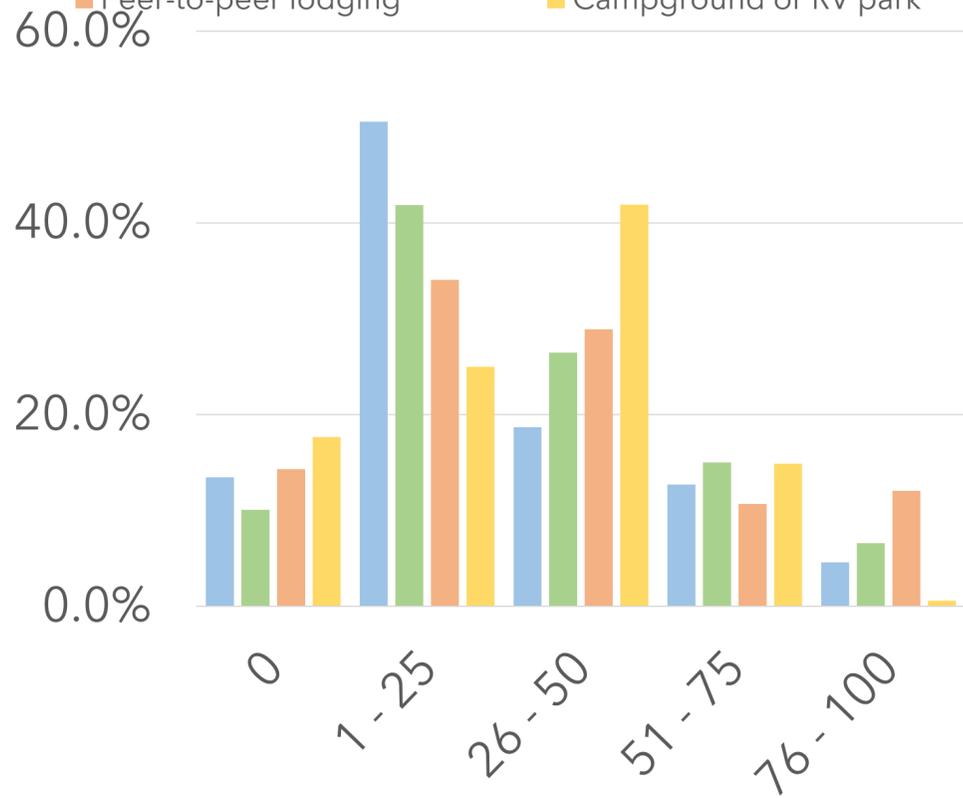


## Percent Potentially Marketable (Index Above 25)

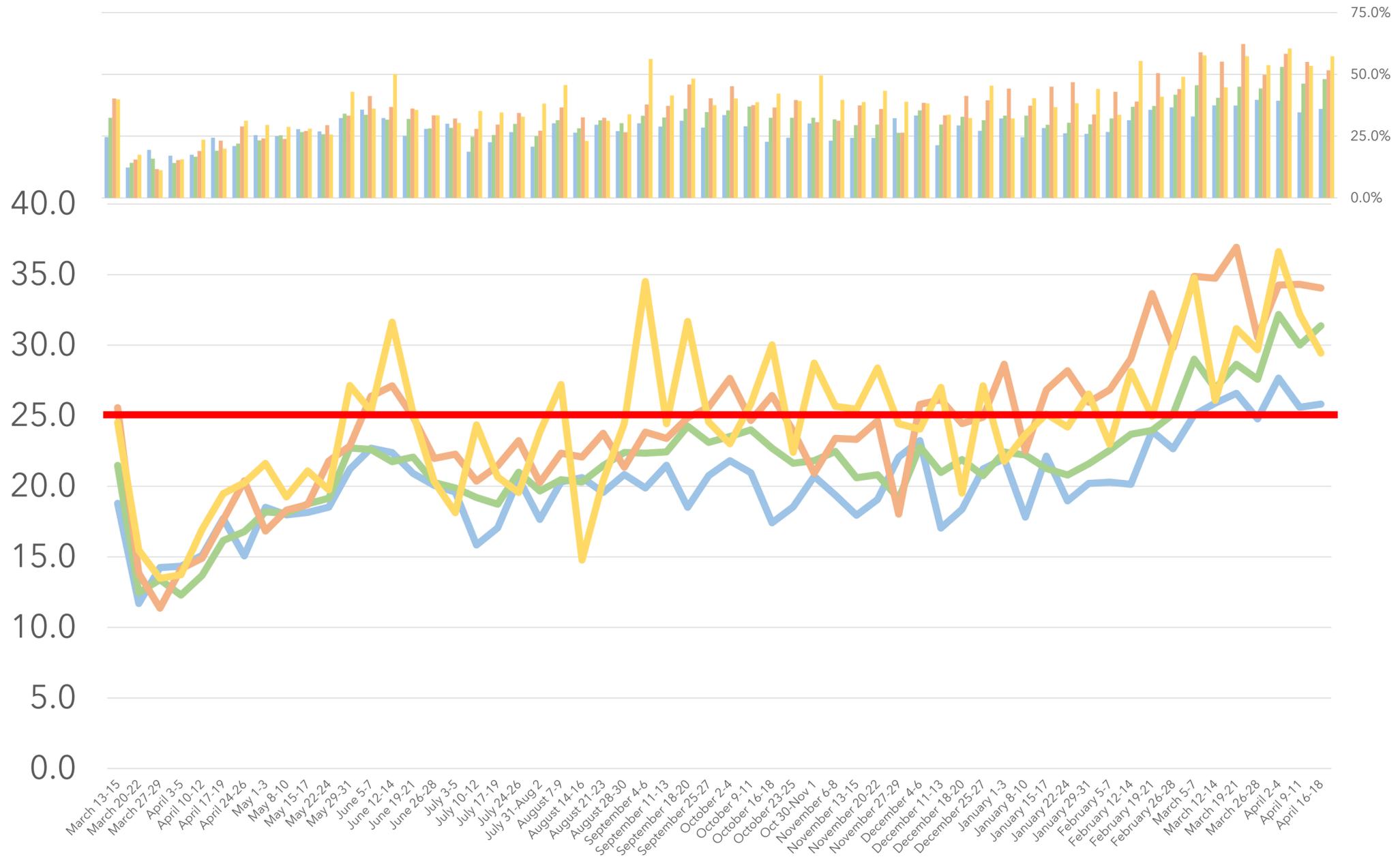


# Lodging Preference

■ Luxury Hotel
 ■ Non-Luxury Hotel
 ■ Peer-to-peer lodging
 ■ Campground or RV park



## Percent Potentially Marketable (Index Above 25)



— Luxury Hotel
 — Non-Luxury Hotel
 — Peer-to-peer lodging
 — Campground or RV park



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